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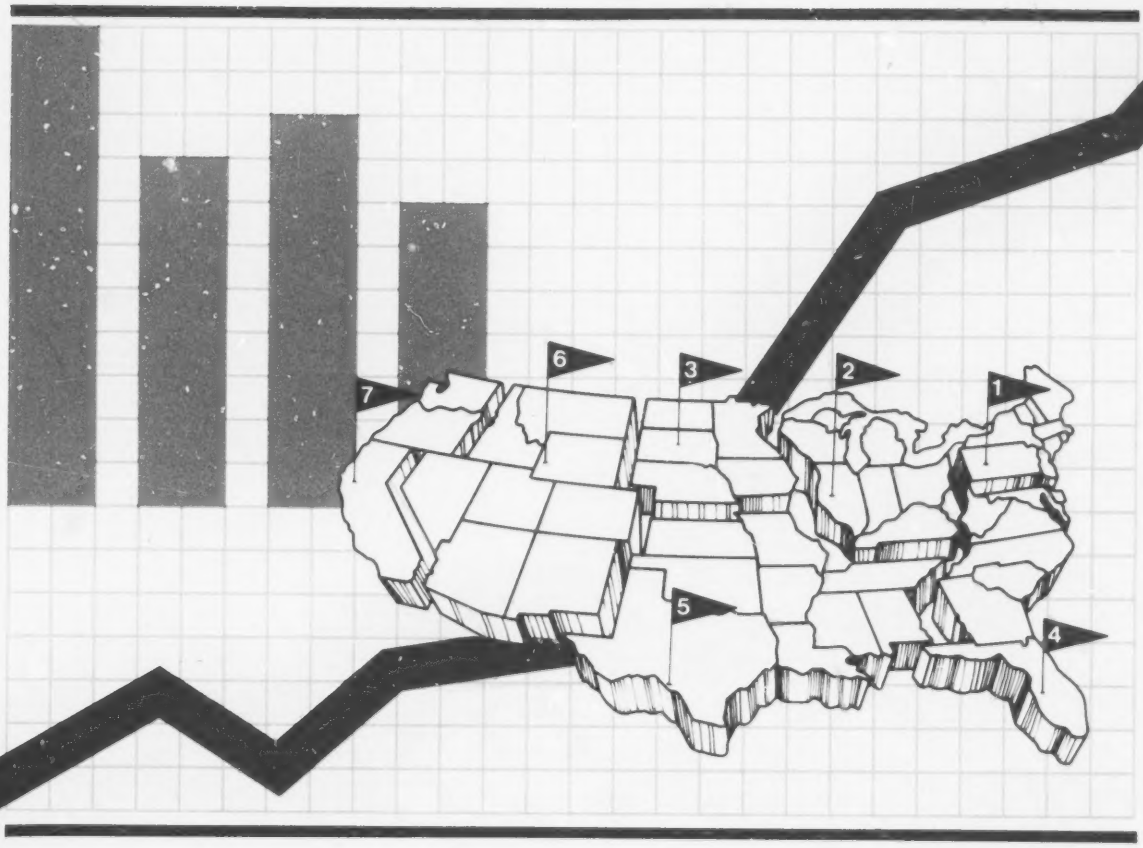
STATISTICAL PROFILE OF GOLF IN THE UNITED STATES

1984 ANNUAL REVIEW



NGF™
NATIONAL GOLF FOUNDATION

STATE OF THE GAME

A long, slow fuse to a major explosion: that's golf in the mid-1980's.

The "State of the Game," as statistically defined in terms of the number of golfers, golf rounds, golf courses, and related product sales, portrays an industry that is growing at a decreasing rate. However, these same statistics, when viewed in light of projected census data, point to an industry that is on the verge of its third and possibly greatest boom in growth.

What transpired in 1984 was an estimated 1.25 percent increase in the number of golfers and 2.5 percent increase in the number of rounds played in the United States. This translates to over 18 million golfers playing over 445 million rounds of golf last year.

The increase in the golf facility count over the year amounted to 84, for a total 12,278 across the nation. The number of golf courses increased to 13,181, up 97 courses over 1983. (This discrepancy between the number of golf facilities and golf courses results because some golf facilities have more than one golf course.)

As the economy improved in 1984, so did the prospects for golf course development. There were 607 projects in planning and 408 courses under construction. This represents an increase over 1983 when there were 562 golf course projects in planning and 355 under construction.

The growth of golf in 1984 continued to lag behind the improving national economy. The modest pick-up in golf course development activity reflects an improving housing market since most current golf course developments are real estate related.

As the economy continues to improve and more people are employed, the short-term outlook for golf is brighter. There will be more disposable income for leisure time activity which translates into more golfers, rounds played and product sales.

Golf . . . A Growth Industry

On closer examination, the census data reveals just how much potential there is for growth.

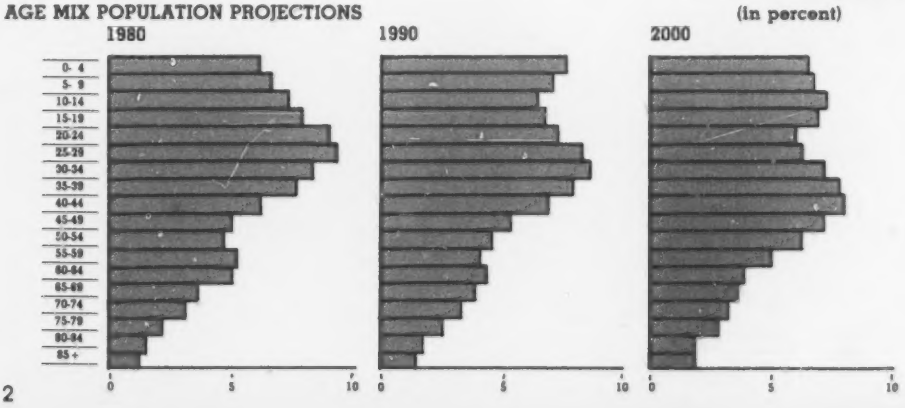
Population in the United States will reach 250 million by 1990 and will be at 268 million at the turn of the century, according to Census Bureau projections. In analyzing the composition of a changing age mix during this period, the Foundation anticipates tremendous growth potential for golf.

While our population is increasing at a slowing rate (from 11.4 percent in the 1970s to 9.7 percent in the '80s, and down to 7.3 percent by the '90s), it is also growing older, and that is good news for golf. The game traditionally is strongest among mature Americans who are in the prime of their working lives or early retirement, and it is this population segment which will expand the most.

In the short-term — between 1980 and 1990 — the number of Americans ages 25 to 45 will increase by 30 percent. This age group will be starting families, building careers and spending money on recreation. By 1990, these baby boomers will account for more than half of all consumer expenditures.

By the mid-1990's, the number of Americans between 30 and 57, the age category of greatest earning capacity, will increase by over 20 million. Clearly, a closer look at the numbers and how it may impact golf is warranted.

The projections regarding the number of golfers for 1990 and 2000 are based on the assumption



that percentages of golfers by age and sex groupings identified by the 1982 Neilsen Sports Participation Survey will remain constant during the next 15 years. Thus, if 16.5 percent of the males aged 18-34 are currently playing golf, we would expect that at least 16.5 percent of that age group would be playing in the year 2000.

If we are correct in assuming that the age group/golf participation relationships will hold or increase, there will be a steady increase in the number of golfers through the year 2000. The largest increases can be anticipated in the 35-54 age category. For example, in 1980 there were approximately four million golfers in that age group. By 1990 there will be approximately 5.2 million, and by 2000 that group will swell to over seven million, representing a 75 percent increase in just 20 years. There will be little variation in the other age categories, as their absolute numbers will remain relatively unchanged. The patterns projected for female golf participation also suggest that most of the increased involvement will occur among the 34-55 and over-55 age groups.

Overall, the number of golfers should increase to 21.2 million by the year 2000. The data suggests that the greatest potential market is with the relatively young adult group (often called "yuppies"). If the percentage of players in that group could be increased over the next five years, it would generate a substantial multiplier effect as they moved into the older age categories. A small growth in the percentage of young adult golfers could result in 25 million or more players in 2000.

Goals

Certainly the job ahead for the industry is not to sit by idly and wait for whatever opportunities might present themselves, as the potential market improves.

IF GOLF IS TO GROW or even retain its current market share of the leisure time dollar, it must market itself aggressively to selected and targeted markets.

This will require a concerted industry-wide and collective effort. We need more customers, more facilities, more golfing activity. The opportunity before us is a tremendous one because we have a great product that meets the recreational needs of an expanding market.

We also have a tremendous challenge ahead to help make golf grow. The right marketing decisions and investments must be made that will give the industry its best return on investment in terms of a bigger and healthier industry.

With kind regards,

David B. Hueber
President

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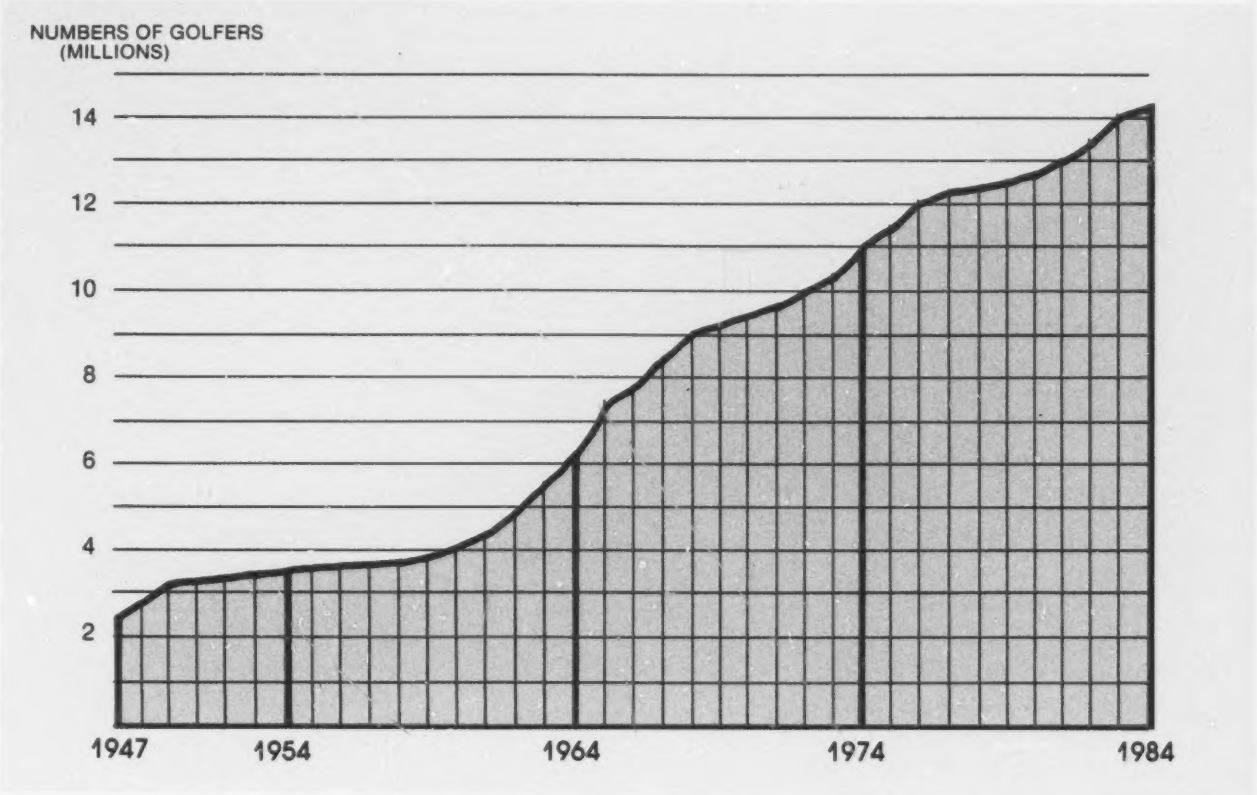
GOLFERS

. . . growth of U.S. golfers



In 1947 the National Golf Foundation estimated that there were 2.5 million frequent[1] golfers in the United States, or 1.9% of the U.S. population. The number of golfers gradually increased to about 5 million by the year 1960. Since that time, as the figure above illustrates, there has been a much more dramatic increase in golf participation.

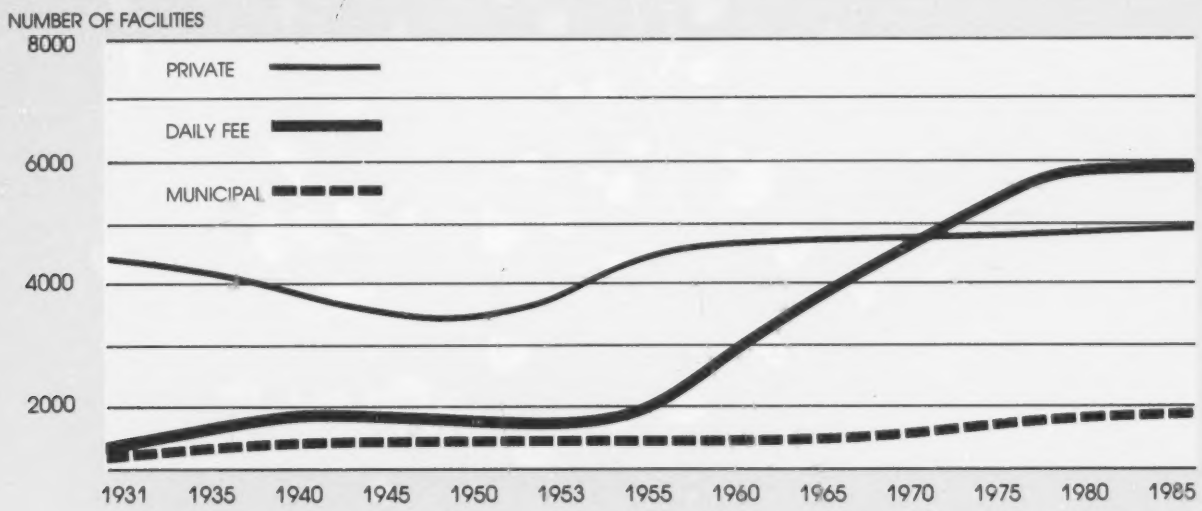
In 1984 there were an estimated 14.5 million frequent golfers in the U.S. The total number of golfers is estimated to be 18 million, or 7.5% of the U.S. population. This larger figure takes into account an estimated 3.5 million occasional[2] golfers.

[1] A **frequent** golfer is defined as an individual playing 15 rounds or more a year.

[2] An **occasional** golfer is defined as an individual playing fewer than 15 rounds per year.

FACILITIES

. . . growth in facilities



1955 was a pivotal year in golf course development. It marked the end of a steady decline in private courses and an absence of growth in daily fee facilities. The number of private courses grew significantly between 1955 and 1970 and then leveled off. Daily fee courses have grown at a faster rate than private courses and sustained that growth through 1984. As the figure illustrates, municipal courses slowly increased through 1960 with a marked increase in growth since then.

Year [3]	Facility Total	Private	Daily Fee	Municipal
1931*	5,691	4,448	700	543
1934	5,727	4,155	1,006	566
1937	5,196	3,489	1,070	637
1939	5,303	3,405	1,199	699
1941	5,209	3,288	1,210	711
1946	4,817	3,018	1,076	723
1947	4,870	3,073	1,061	736
1948	4,901	3,090	1,076	735
1949	4,926	3,068	1,108	750
1950	4,931	3,049	1,141	741
1951	4,970	2,996	1,214	760
1952	5,026	3,029	1,246	751
1953	5,056	2,970	1,321	765
1954	5,076	2,878	1,392	806
1955	5,218	2,807	1,534	877
1956	5,358	2,801	1,692	865
1957	5,553	2,887	1,832	834
1958	5,745	2,986	1,904	855
1959	5,991	3,097	2,023	871
1960	6,385	3,236	2,254	895
1961	6,623	3,348	2,363	912
1962	7,070	3,503	2,636	931
1963	7,477	3,615	2,868	994
1964	7,893	3,764	3,114	1,015
1965	8,323	3,887	3,368	1,068
1966	8,672	4,016	3,483	1,173
1967	9,336	4,166	3,960	1,210
1968	9,615	4,269	4,110	1,236
1969	9,926	4,459	4,192	1,275
1970	10,188	4,619	4,248	1,321
1971	10,494	4,720	4,404	1,370
1972	10,665	4,787	4,484	1,394
1973	10,896	4,720	4,710	1,466
1974	11,134	4,715	4,878	1,541
1975	11,370	4,770	5,014	1,586
1976	11,562	4,791	5,121	1,650
1977	11,745	4,847	5,203	1,695
1978	11,885	4,872	5,271	1,742
1979	11,966	4,848	5,340	1,778
1980	12,005	4,839	5,372	1,794
1981	12,035	4,789	5,428	1,818
1982	12,140	4,798	5,494	1,848
1983	12,197	4,809	5,528	1,860
1984	12,278	4,831	5,566	1,881

[3] 1931 is the earliest year for which golf facility statistics are available. Includes regulation, executive and par-3 facilities.

. . . new facilities

COURSE OPENINGS

In 1984 new course openings and additions to existing facilities totaled 136 compared to 104 in 1983. Of these 136, 84 were new facilities and 52 were additions to existing facilities. Leading states were Flordia (31), Arizona (14), California (11), Colorado (11), and Michigan (8).

CONSTRUCTION STARTS

There were 145 course construction starts in 1984 compared to 100 in 1983. Of the 145 new projects, 88 were brand new golf courses and 57 were expansion programs to existing facilities. Leading states were Florida (27), California (15), North Carolina (12), Michigan (11), and South Carolina (10).

IN PLANNING

There were 131 golf courses that were officially declared in planning in 1984 compared to 102 in 1983. California leads in courses in planning with 22 followed by Michigan (21), Illinois (14), Florida (13), and Indiana (9).

GOLF COURSES IN THE UNITED STATES

. . . by type,[4] size, state and region

STATE and DIVISION	REGULATION												EXECUTIVE					
	PRIVATE			DAILY FEE			MUNICIPAL			REGULATION TOTAL			PRIVATE			DAILY FEE		
	COURSES			COURSES			COURSES			COURSES			COURSES			COURSES		
	9	18	FAC	9	18	FAC	9	18	FAC	9	18	FAC	9	18	FAC	9	18	FAC
Maine	8	6	14	63	19	82	4	2	5	75	27	101	1	0	1	3	0	3
New Hampshire	2	9	11	37	23	59	0	3	3	39	35	73	1	0	1	7	0	6
Vermont	4	7	11	23	18	41	0	0	0	27	25	52	0	0	0	2	0	2
Massachusetts	42	77	115	78	62	139	11	24	34	131	163	288	1	0	1	6	3	9
Rhode Island	3	17	20	12	12	24	1	2	3	16	31	47	0	0	0	1	0	1
Connecticut	22	60	77	23	23	45	5	26	28	50	109	150	2	0	1	2	1	3
New England	**81**	**176**	**248**	**236**	**157**	**390**	**21**	**57**	**73**	**338**	**390**	**711**	**5**	**0**	**4**	**21**	**4**	**24**
New York	64	194	247	166	152	306	21	77	85	251	423	638	13	0	9	29	9	31
New Jersey	24	93	107	21	53	69	6	34	36	51	180	212	0	1	1	8	2	8
Pennsylvania	60	173	224	103	186	277	7	27	32	170	386	533	6	1	5	14	10	21
Middle Atlantic	**148**	**460**	**578**	**290**	**391**	**652**	**34**	**138**	**153**	**472**	**989**	**1383**	**19**	**2**	**15**	**51**	**21**	**60**
Ohio	46	142	177	130	227	337	18	52	63	194	421	577	3	2	3	21	15	31
Indiana	37	71	106	65	92	151	14	39	52	116	202	309	1	1	2	10	3	10
Illinois	63	130	186	101	105	192	29	81	103	193	316	481	4	0	3	19	5	18
Michigan	32	108	137	177	242	389	31	42	66	240	392	592	6	0	4	21	8	20
Wisconsin	30	51	79	125	91	209	16	32	46	171	174	334	0	0	0	16	4	17
E. North Central	**208**	**502**	**685**	**598**	**757**	**1278**	**108**	**246**	**330**	**914**	**1505**	**2293**	**14**	**3**	**12**	**87**	**35**	**96**
Minnesota	42	47	89	100	45	143	24	35	59	166	127	291	4	0	3	23	5	23
Iowa	142	34	174	93	14	106	21	27	48	256	75	328	1	0	1	7	0	6
Missouri	68	49	114	59	29	85	24	15	39	151	93	238	4	0	3	3	1	3
North Dakota	23	8	31	25	1	26	35	4	39	83	13	96	1	0	1	3	0	3
South Dakota	35	8	43	30	0	30	17	6	22	82	14	95	1	0	1	1	0	1
Nebraska	53	18	70	40	9	49	19	10	29	112	37	148	2	2	4	6	0	6
Kansas	87	34	118	49	9	57	24	19	43	160	62	218	5	0	5	3	0	2
W. North Central	**450**	**198**	**639**	**396**	**107**	**496**	**164**	**116**	**279**	**1010**	**421**	**1414**	**18**	**2**	**18**	**46**	**6**	**44**
Delaware	4	12	14	0	4	4	0	2	2	4	18	20	0	1	0	0	0	0
Maryland	16	79	85	4	12	15	6	18	23	26	109	123	1	1	2	2	1	3
District of Columbia	1	0	1	0	0	0	2	2	3	3	2	4	1	0	1	0	0	0
Virginia	42	90	123	24	52	70	6	14	19	72	156	212	2	0	2	1	2	2
West Virginia	23	21	44	29	[illegible]	47	7	6	13	59	47	104	1	0	1	3	0	2
North Carolina	43	151	183	42	[illegible]	174	6	19	24	91	306	381	1	1	1	1	4	4
South Carolina	24	89	105	26	84	100	1	4	5	51	177	210	2	1	2	2	0	2
Georgia	75	96	162	34	30	59	16	23	36	125	149	257	1	0	1	1	1	1
Florida	38	250	228	44	227	238	11	46	50	93	523	516	9	18	20	17	63	72
South Atlantic	**266**	**788**	**945**	**203**	**565**	**707**	**55**	**134**	**175**	**524**	**1487**	**1827**	**18**	**22**	**30**	**27**	**71**	**86**
Kentucky	51	50	100	35	18	53	14	17	30	100	85	183	2	0	1	1	1	2
Tennessee	43	61	100	39	27	65	11	30	40	93	118	205	0	0	0	1	2	3
Alabama	58	68	120	15	19	34	10	20	30	83	107	184	3	0	1	3	0	3
Mississippi	58	43	99	9	12	20	6	4	10	73	59	129	0	0	0	0	0	0
E. South Central	**210**	**222**	**419**	**98**	**76**	**172**	**41**	**71**	**110**	**349**	**369**	**701**	**5**	**0**	**2**	**5**	**3**	**8**
Arkansas	54	38	88	19	14	31	5	7	11	78	59	130	1	1	1	0	0	0
Louisiana	42	48	89	16	6	22	9	16	22	67	70	133	1	0	0	0	0	0
Oklahoma	34	29	62	34	14	46	22	25	44	90	68	152	1	0	1	0	0	0
Texas	145	195	319	81	58	133	57	73	119	283	326	571	2	2	3	2	0	1
W. South Central	**275**	**310**	**558**	**150**	**92**	**232**	**93**	**121**	**196**	**518**	**523**	**986**	**5**	**3**	**5**	**2**	**0**	**1**
Montana	16	9	25	22	4	26	14	6	19	52	19	70	0	0	0	0	0	0
Idaho	3	13	16	22	10	32	10	10	20	35	33	68	0	0	0	3	0	3
Wyoming	7	8	13	16	3	19	9	6	15	32	17	47	0	0	0	1	0	1
Colorado	11	42	48	19	20	39	19	34	52	49	96	139	0	0	0	7	1	8
New Mexico	14	15	27	11	10	20	10	11	21	35	36	68	1	0	0	0	0	0
Arizona	6	47	47	18	43	55	9	16	24	33	106	126	3	3	4	18	12	28
Utah	3	16	19	11	5	16	22	15	36	36	36	71	0	0	0	4	1	5
Nevada	1	4	5	6	13	19	6	7	13	13	24	37	0	0	0	1	1	1
Mountain	**61**	**154**	**200**	**125**	**108**	**226**	**99**	**105**	**200**	**285**	**367**	**626**	**4**	**3**	**4**	**34**	**15**	**46**
Washington	17	41	56	41	49	90	10	23	33	68	113	179	0	0	0	11	1	11
Oregon	10	22	30	39	34	69	6	5	11	55	61	110	2	0	2	15	2	16
California	31	219	230	77	150	211	21	102	113	129	471	554	10	8	16	53	30	73
Alaska	1	1	2	3	2	5	0	0	0	4	3	7	0	0	0	1	0	1
Hawaii	4	10	12	8	30	34	1	6	7	13	46	53	0	0	0	2	1	2
Pacific	**63**	**293**	**330**	**168**	**265**	**409**	**38**	**136**	**164**	**269**	**694**	**903**	**12**	**8**	**18**	**82**	**34**	**103**
U.S. TOTALS	**1762**	**3103**	**4602**	**2264**	**2518**	**4562**	**653**	**1124**	**1680**	**4679**	**6745**	**10844**	**100**	**43**	**108**	**356**	**189**	**468**

4 The term facility denotes a single geographical area that contains one or more golf courses under one management. Where a facility includes courses of different sizes, the facility is counted in the column of its highest-par course (e.g., a facility with a 9 hole regulation and an 18 hole executive course would be tallied in the appropriate regulation facility column).

EXECUTIVE						PAR-3												GRAND TOTALS					
MUNICIPAL			EXECUTIVE TOTAL			PRIVATE			DAILY FEE			MUNICIPAL			PAR-3 TOTAL			COURSES			COURSE TOTALS	FACILITY TOTAL	STATE
COURSES			COURSES			COURSES			COURSES			COURSES			COURSES								
9	18	FAC	9	18	FAC	9	18	FAC	9	18	FAC	9	18	FAC	9	18	FAC	9	18	FAC			
1	0	1	5	0	5	0	0	0	5	2	7	1	0	1	6	2	8	86	29	114	115	114	ME
0	0	0	8	0	7	3	0	2	9	0	8	0	0	0	12	0	10	59	35	90	94	90	NH
0	0	0	2	0	2	1	0	1	1	1	2	0	0	0	2	1	3	31	26	57	57	57	VT
0	0	0	7	3	10	0	0	0	13	19	32	0	0	0	13	19	32	151	185	330	336	330	MA
0	0	0	1	0	1	0	0	0	1	2	3	0	0	0	1	2	3	18	33	51	51	51	RI
0	0	0	8	2	9	1	0	1	3	4	7	1	0	1	5	4	9	63	115	168	178	168	CT
4	1	5	31	5	34	5	0	4	32	28	59	2	0	2	39	28	65	408	423	810	831	810	NE
5	1	6	49	11	48	5	1	4	43	5	42	4	6	6	52	12	52	352	446	738	798	738	NY
7	2	8	9	4	11	2	1	3	8	8	12	7	0	3	17	9	18	77	193	241	270	241	NJ
1	1	2	22	12	28	5	2	7	36	17	42	2	0	1	43	19	50	235	417	611	652	611	PA
2	1	2	80	27	87	12	4	14	87	30	96	13	6	10	112	40	120	664	1056	1590	1720	1590	MA
10	4	12	30	19	39	1	1	2	32	10	33	3	1	1	36	12	36	260	452	652	712	652	OH
6	2	5	13	5	15	2	0	1	20	9	23	2	3	5	24	12	29	153	219	353	372	353	IN
2	1	3	31	6	30	5	1	6	17	2	16	9	1	8	31	4	30	255	326	541	581	541	IL
8	1	9	30	10	28	2	0	1	25	9	27	3	2	3	30	11	31	300	413	651	713	651	MI
3	2	4	20	4	21	3	0	3	13	1	12	5	3	8	21	4	23	212	182	378	394	378	WI
4	0	4	124	44	133	13	2	13	107	31	111	22	10	25	142	43	149	1180	1592	2575	2772	2575	ENC
23	6	29	33	5	30	1	0	0	34	2	28	9	1	5	44	3	33	243	135	354	378	354	MN
6	0	4	9	1	9	3	0	2	6	1	5	3	0	2	12	1	9	277	77	346	354	346	IA
1	1	2	7	2	7	5	1	6	4	1	3	1	0	1	10	2	10	168	97	255	265	255	MO
0	1	1	6	0	6	1	0	0	1	0	1	2	0	2	4	0	3	93	13	105	106	105	ND
2	0	2	4	0	4	1	0	0	0	0	0	0	0	0	1	0	0	87	14	99	101	99	SD
2	0	2	10	2	12	2	1	2	6	0	6	4	0	4	12	1	12	134	40	172	174	172	NE
2	0	2	10	0	8	1	0	1	2	1	3	3	0	1	6	1	5	176	63	231	239	231	KS
15	2	14	79	10	76	14	2	11	53	5	46	22	1	15	89	8	72	1178	439	1562	1617	1562	WNC
0	0	0	0	1	0	0	0	0	1	0	1	0	0	0	1	0	1	5	19	21	24	21	DE
3	0	2	6	2	7	1	0	0	2	4	6	0	0	0	3	4	6	35	115	136	150	136	MD
0	0	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	4	2	5	6	5	DC
1	1	1	4	3	5	1	1	2	4	2	5	1	1	1	6	4	8	82	163	225	245	225	VA
1	0	1	5	0	4	1	0	0	6	0	5	3	3	3	10	3	8	74	50	116	124	116	WV
0	2	1	2	7	6	6	0	5	15	4	15	1	2	2	22	6	22	115	319	409	434	409	NC
0	0	0	4	1	4	2	1	2	11	4	12	1	0	1	14	5	15	69	183	229	252	229	SC
0	0	0	2	1	2	3	1	3	5	1	6	0	1	1	8	3	10	135	153	269	288	269	GA
7	3	7	33	84	99	11	8	15	26	13	32	2	3	5	39	24	52	165	631	667	796	667	FL
12	6	12	57	99	128	25	11	27	70	28	82	8	10	13	103	49	122	684	1635	2077	2319	2077	SA
3	1	4	6	2	7	1	0	0	5	1	5	4	1	4	10	2	9	116	89	199	205	199	KY
1	0	1	2	2	4	1	1	1	3	2	5	0	0	0	4	3	6	99	123	215	222	215	TN
0	0	0	6	0	4	1	0	0	9	1	7	1	0	1	11	1	8	100	108	196	208	196	AL
0	0	0	0	0	0	0	0	0	4	2	5	0	0	0	4	2	5	77	61	134	138	134	MS
4	1	5	14	4	15	3	1	1	21	6	22	5	1	5	29	8	28	392	381	744	773	744	ESC
0	0	0	1	1	1	2	0	1	2	0	2	0	0	0	4	0	3	83	60	134	143	134	AR
1	0	0	2	0	0	0	0	0	1	1	2	0	0	0	1	1	2	70	71	135	141	135	LA
0	0	0	1	0	1	1	0	1	5	0	5	1	1	1	7	1	7	98	69	160	167	160	OK
1	1	1	5	3	5	10	1	5	15	3	16	4	4	5	29	8	26	317	337	602	654	602	TX
2	1	1	9	4	7	13	1	7	23	4	25	5	5	6	41	10	38	568	537	1031	1105	1031	WSC
0	0	0	0	0	0	0	0	0	1	0	0	1	1	1	2	1	1	54	20	71	74	71	MT
1	0	1	4	0	4	1	0	1	3	1	4	1	0	1	5	1	6	44	34	78	78	78	ID
0	0	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	33	17	48	50	48	WY
3	1	3	10	2	11	7	0	5	4	0	4	6	0	1	17	0	10	76	98	160	174	160	CO
1	0	0	2	0	0	1	0	1	1	0	1	4	0	1	6	0	3	43	36	71	79	71	NM
3	0	2	24	15	34	1	1	2	5	2	6	1	0	1	7	3	9	64	124	169	188	169	AZ
3	0	2	7	1	7	2	0	2	3	0	2	1	0	1	6	0	5	49	37	83	86	83	UT
0	1	0	1	2	1	0	0	0	0	0	0	1	0	1	1	0	1	15	26	39	41	39	NV
11	2	8	49	20	58	12	1	11	17	3	17	15	1	7	44	5	35	378	392	719	770	719	MTN
2	1	2	13	2	13	5	0	5	11	2	12	6	1	4	22	3	21	103	118	213	221	213	WA
1	0	1	18	2	19	2	0	2	7	2	7	1	1	2	10	3	11	83	66	140	149	140	OR
10	3	11	73	41	100	27	1	25	44	22	57	17	4	14	88	27	96	290	539	750	829	750	CA
1	0	1	2	0	2	0	0	0	0	0	0	0	0	0	0	0	0	6	3	9	9	9	AK
0	0	0	2	1	2	1	1	1	1	1	2	0	0	0	2	2	3	17	49	58	66	58	HI
14	4	15	108	46	136	35	2	33	63	27	78	24	6	20	122	35	131	499	775	1170	1274	1170	PAC
96	27	98	551	259	674	132	24	121	473	162	536	116	40	103	721	226	760	5951	7230	12278	13181	12278	U.S.

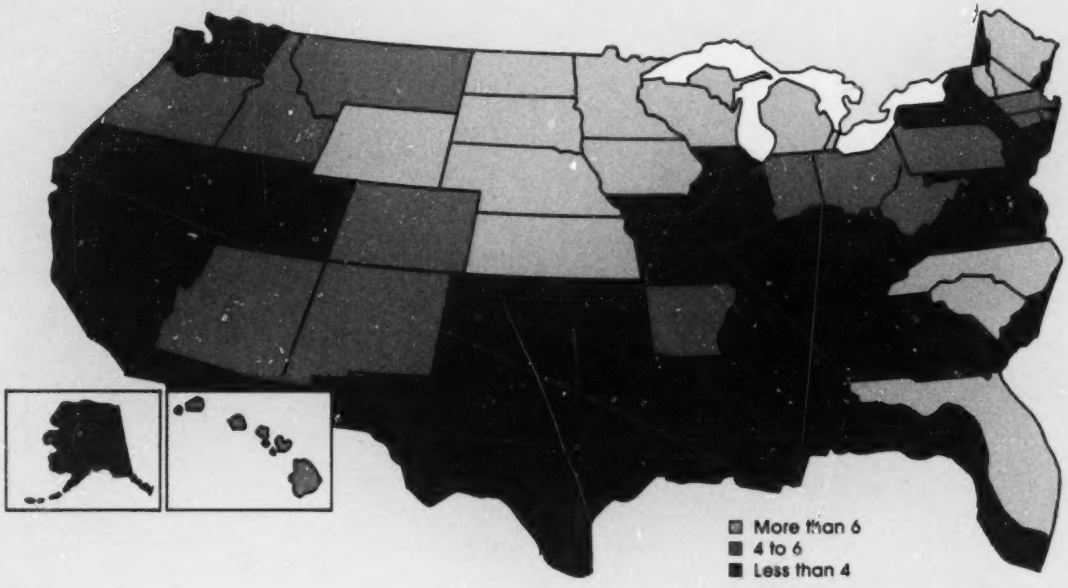
PER CAPITA ANALYSIS

. . . population/course ratios by state

State and Division	Population 1984 Estimate [5]	Total No. of 18-Hole Courses [6]	Population per Course	No. 18-Hole Courses Open to Public	Population per Public Course
Maine	1,156,000	72.0	16,056	61.5	18,797
New Hampshire	977,000	64.5	15,147	52.5	18,610
Vermont	530,000	41.5	12,771	32.0	16,563
Massachusetts	5,798,000	260.5	22,257	162.0	35,790
Rhode Island	962,000	42.0	22,905	23.5	40,936
Connecticut	3,154,000	146.5	21,524	74.0	42,622
New England	**12,577,000**	**627.0**	**20,059**	**405.5**	**31,016**
New York	17,735,000	622.0	28,513	386.0	45,946
New Jersey	7,515,000	231.5	32,462	123.5	60,850
Pennsylvania	11,901,000	534.5	22,266	323.0	36,845
Middle Atlantic	**37,151,000**	**1,388.0**	**26,766**	**832.5**	**44,626**
Ohio	10,752,000	582.0	18,474	412.0	26,097
Indiana	5,498,000	295.5	18,606	203.5	27,017
Illinois	11,511,000	453.5	25,383	286.5	40,178
Michigan	9,075,000	563.0	16,119	435.0	20,862
Wisconsin	4,766,000	288.0	16,549	220.5	21,615
E. North Central	**41,602,000**	**2,182.0**	**19,066**	**1557.5**	**26,710**
Minnesota	4,162,000	256.5	16,226	186.0	22,376
Iowa	2,910,000	215.5	13,503	108.5	26,820
Missouri	5,008,000	181.0	27,669	92.5	54,141
North Dakota	686,000	59.5	11,529	39.0	17,590
South Dakota	706,000	57.5	12,278	31.0	22,774
Nebraska	1,606,000	107.0	15,009	57.5	27,930
Kansas	2,438,000	151.0	16,146	70.5	34,582
W. North Central	**17,516,000**	**1,028.0**	**17,038**	**585.0**	**29,940**
Delaware	613,000	21.5	28,512	6.5	94,308
Maryland	4,349,000	132.5	32,823	43.5	99,977
District of Columbia	623,000	4.0	155,750	3.0	207,667
Virginia	5,636,000	204.0	27,627	90.5	62,276
West Virginia	1,952,000	87.0	22,437	53.5	36,486
North Carolina	6,165,000	376.5	16,375	199.5	30,902
South Carolina	3,300,000	217.5	15,172	112.5	29,333
Georgia	5,837,000	220.5	26,472	84.0	69,488
Florida	10,976,000	713.5	15,383	408.5	26,869
South Atlantic	**39,451,000**	**1977.0**	**19,954**	**1001.5**	**39,391**
Kentucky	3,723,000	147.0	25,327	70.0	53,186
Tennessee	4,717,000	172.5	27,345	88.5	53,299
Alabama	3,990,000	158.0	25,253	59.0	67,627
Mississippi	2,598,000	99.5	26,111	27.5	94,473
E. South Central	**15,028,000**	**577.0**	**26,045**	**245.0**	**61,339**
Arkansas	2,349,000	101.5	23,143	34.0	69,088
Louisiana	4,462,000	106.0	42,094	36.5	122,247
Oklahoma	3,298,000	118.0	27,949	71.0	46,451
Texas	15,989,000	495.5	32,268	219.0	73,009
W. South Central	**26,098,000**	**821.0**	**31,788**	**360.5**	**72,394**
Montana	824,000	47.0	17,532	30.0	27,467
Idaho	1,001,000	56.0	17,875	41.0	24,415
Wyoming	511,000	33.5	15,254	22.0	23,227
Colorado	3,178,000	136.0	23,368	85.0	37,388
New Mexico	1,424,000	57.5	24,765	34.5	41,275
Arizona	3,053,000	156.0	19,571	100.0	30,530
Utah	1,652,000	61.5	26,862	43.0	38,419
Nevada	911,000	33.5	27,194	29.0	31,414
Mountain	**12,554,000**	**581.0**	**21,606**	**384.5**	**32,648**
Washington	4,349,000	169.5	25,658	117.5	37,013
Oregon	2,674,000	107.5	24,874	78.5	34,064
California	25,622,000	684.0	37,459	422.0	60,716
Alaska	500,000	6.0	83,333	4.5	11,111
Hawaii	1,039,000	57.5	18,070	44.0	23,614
Pacific	**34,184,000**	**1,024.5**	**33,367**	**666.5**	**51,289**
U.S. TOTALS	**236,161,000**	**10,205.5**	**23,140**	**6,038.5**	**39,109**

[5] Source: U.S. Bureau of the Census — 1984 Preliminary Estimate only
[6] The total number of holes in each state is divided by 18.

. . . number of courses per 100,000 inhabitants



* The national average is 4.32 courses per 100,000 inhabitants

. . . leading and trailing metropolitan areas

LEADING AREAS[7]	% Above Average
Pittsfield, MA	165
Utica-Rome, NY	111
Roanoke-Lynchburg, VA	99
Grand Rapids-Muskegeon, MI	76
Wilmington, NC	76
Kankakee, IL	75
Syracuse, NY	72
Battle Creek-Lansing-Jackson-Kalamazoo, MI	71
Appleton-Oskosh, WI	66
Rochester, MN	64

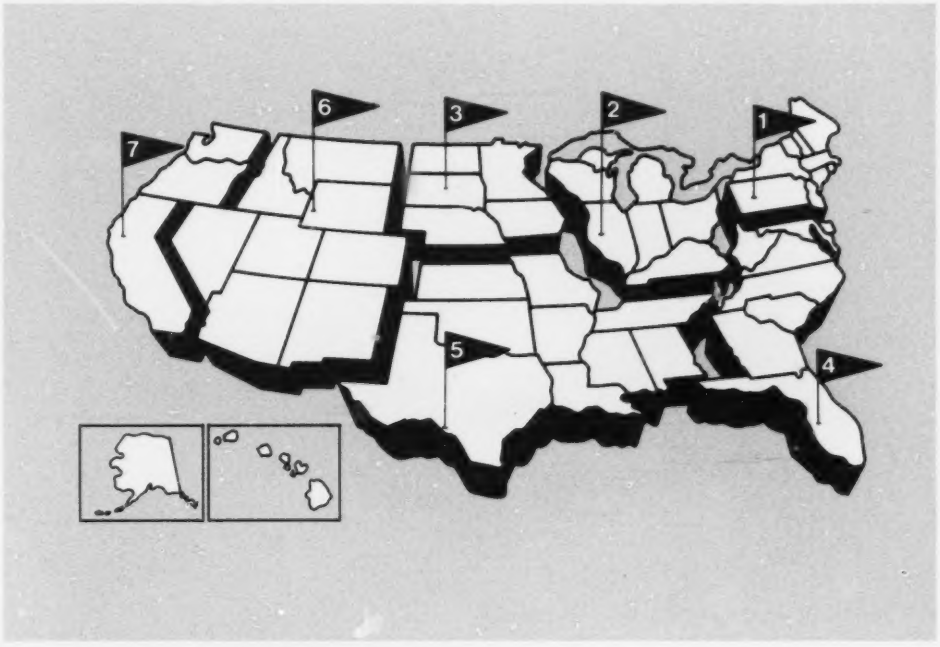
TRAILING AREAS	% Below Average
Norfolk-Newport News-Hampton-Portsmouth, VA	87
Laredo, TX	77
New York, NY-NJ	73
Williamsport, PA	71
Los Angeles-Long Beach, CA	69
Bridgeport, CT	65
New Brunswick, NJ	63
El Paso, TX	61
New Orleans, LA	61
Baltimore, MD	60

[7] This table excludes the winter resort areas of Palm Beach-Boca Raton and Fort Myers, Florida, which are above the national average by 309% and 235% respectively.

ROUNDS OF PLAY

. . . 1984 by region[8]

Region	Rounds Played
Northeast	68,000,000
E.N. Central	104,000,000
W.N. Central	34,000,000
South Atlantic	99,000,000
South Central	59,000,000
Mountain	29,000,000
Pacific	52,000,000
TOTAL	445,000,000



. . . 1984 quarterly rounds played analysis[9]

REGION	COURSES REPORTING INCREASE	COURSES REPORTING DECREASE	COURSES REPORTING NO CHANGE	ACTUAL ROUNDS
1. Northeast	46%	54%	–	-2.8
2. E. North Central	54	46	–	1.1
3. W. North Central	60	40	–	2.4
4. South Atlantic	91	9	–	9.6
5. South Central	57	38	5	-.5
6. Mountain	46	46	8	3.3
7. Pacific	84	16	–	8.9
U.S. TOTALS	57%	40%	3%	2.5%

[9] Based on a quarterly sample of 700 courses

. . . annual growth in rounds played (in millions)[10]

YEAR	ROUNDS	YEAR	ROUNDS	YEAR	ROUNDS	YEAR	ROUNDS
1957	65.7	1964	143.0	1971	215.0	1978	336.6
1958	72.0	1965	160.0	1972	235.0	1979	346.0
1959	81.4	1966	176.0	1973	260.0	1980	359.0
1960	86.8	1967	190.0	1974	280.0	1981	395.0
1961	102.6	1968	194.0	1975	300.0	1982	425.0
1962	110.0	1969	200.0	1976	316.0	1983	434.0
1963	126.0	1970	207.0	1977	332.0	1984	445.0

[8] Geographic regions concur with the U.S. Bureau of the Census divisions.
[10] Annual rounds played data are not available prior to 1957.

1984 STATISTICAL SUMMARY

Number of Golfers

Frequent golfers	14,500,000
Occasional golfers	3,500,000
Total estimated golfers	**18,000,000**

Number of Facilities

TYPE	PRIVATE	DAILY FEE	MUNICIPAL	FACILITY TOTAL
Regulation	4602	4562	1680	10,844
Executive	108	468	98	674
Par-3	121	536	103	760
U.S. TOTAL	**4831**	**5566**	**1881**	**12,278**

Number of Courses

TYPE	PRIVATE		DAILY FEE		MUNICIPAL		COURSE TOTAL
	9	18	9	18	9	18	(9 & 18)
Regulation	1762	3103	2264	2518	653	1124	11,424
Executive	100	43	355	189	96	27	810
Par-3	132	24	473	162	116	40	947
U.S. TOTAL	**1994**	**3170**	**3092**	**2869**	**865**	**1191**	**13,181**

Number of Rounds Played

FACILITY		ROUNDS (IN MILLIONS)			
TYPE	TOTAL	MEN	WOMEN	JUNIORS	SENIORS
Private	149	76	30	10	33
Daily Fee	196	117	31	12	36
Municipal	100	56	15	9	20
U.S. TOTAL	**445**	**249**	**76**	**31**	**89**

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